

## **CLAIMS**

The invention claimed is:

- 1     1.     A system for optimizing selection of a college or a university for a student with parents  
2           forming a family, said system comprising:  
3           a)     a college planning questionnaire;  
4           b)     college planning questionnaire software; and  
5           c)     a college action plan;  
6           wherein said college planning questionnaire collects important data from the family  
7           including information about interests of the student, aptitude of the student, abilities  
8           of the student, talents of the student, and selection preferences of the college or the  
9           university of the student;  
10          wherein said college planning questionnaire collects critical information about the  
11          finances of the family from both the parents and the student;  
12          wherein said college planning questionnaire software assists the student in filling out  
13          said college planning questionnaire by helping the student identify appropriate areas  
14          of interest or specific college majors by virtue of said college planning questionnaire  
15          software interactively conducting a battery of tests in order to perform a thorough  
16          analysis of the likes and dislikes of the student so as to form choices;  
17          wherein said college action plan is designed to take the family through the entire  
18          college transition process; and  
19          wherein said college action plan is created by information from said college planning  
20          questionnaire.

- 1 2. The system as defined in claim 1, wherein said college action plan includes only  
2 colleges and universities offering degrees in the student's specific college majors.
- 1 3. The system as defined in claim 1, wherein said college planning questionnaire is an  
2 extensive multi-page document.
- 1 4. The system as defined in claim 1, wherein said college planning questionnaire includes  
2 a parents section;  
3 wherein said parents section is completed by the parents;  
4 wherein said college planning questionnaire includes a student section; and  
5 wherein said student section is completed by the student.
- 1 5. The system as defined in claim 1, wherein said college planning questionnaire  
2 software compares said choices with corresponding college majors and potential career  
3 choices.
- 1 6. The system as defined in claim 1, wherein said college planning questionnaire  
2 software is a CD.
- 1 7. The system as defined in claim 1, wherein a printable report is available after  
2 completing each of said battery of tests;  
3 wherein said report allows the student to evaluate his/her interests;  
4 wherein said report provides information about how to select an appropriate college  
5 major or area of interest; and

6 wherein said report includes information about appropriate careers, annual income,  
7 industry outlook, and a brief job description of all different careers.

1 8. The system as defined in claim 1, wherein said college action plan comprises a hard  
2 copy;  
3 wherein said college action plan comprises a video; and  
4 wherein said college action plan comprises a profile worksheet.

1 9. The system as defined in claim 1, wherein said college action plan comprises a test  
2 preparation system.

1 10. The system as defined in claim 8, wherein said hard copy of said college action plan  
2 includes major sections;  
3 wherein said hard copy of said college action plan includes an action item checklist at  
4 the end of each of said major sections to assist the family in tracking their progress  
5 through said college action plan; and  
6 wherein said hard copy of said college action plan includes an appendix.

1 11. The system as defined in claim 10, wherein said major sections include two main  
2 sections;  
3 wherein said two main sections are unique to each family; and  
4 wherein said two main sections provide customized data provided from information  
5 from said college planning questionnaire.

1 12. The system as defined in claim 11, wherein said two main sections include a financial  
2 aid section; and  
3 wherein said two main sections include a college selection section.

1 13. The system as defined in claim 12, wherein said financial aid section is designed to  
2 help maximize a family's financial aid package through all available avenues as well  
3 as by educating the family about how an expected family contribution will be  
4 calculated so that the family can take a proactive approach;  
5 wherein said financial aid section provides the family with a detailed look at their  
6 current financial situation as it relates to paying for the college or the university;  
7 wherein said financial aid section provides the family with an initial financial analysis  
8 and the expected family contribution;  
9 wherein said financial aid section provides a true cost of attendance;  
10 wherein said financial aid section lists types and amounts of financial aid typically  
11 offered;  
12 wherein said financial aid section recommends specific strategies that the family could  
13 apply which may help lower the expected family contribution so as to form  
14 recommended strategies; and  
15 wherein said financial aid section illustrates an adjusted statement of income and assets  
16 that the expected family contribution should look like if the family applied said  
17 recommended strategies.

1 14. The system as defined in claim 12, wherein said college selection section provides a  
2 list of colleges and/or universities;

3 wherein said list of colleges and/or universities are selected from a list of more than  
4 two thousand 4-year colleges and universities that best fit the needs of the student  
5 based on answers of the student on said college planning questionnaire;  
6 wherein said list of colleges and/or universities are listed in order of affordability;  
7 wherein said list of colleges and/or universities takes into consideration GPA, test  
8 scores, as well as individual preferences of the student; and  
9 wherein the first entry on said list of colleges and/or universities is the college or the  
10 university that most closely matches the interests of the student and has the lowest  
11 out-of-pocket cost.

1 15. The system as defined in claim 12, wherein said college selection section provides a  
2 detailed analysis of each college and/or university listed on said list of colleges and/or  
3 universities so that the family can make decisions about the merits of each college  
4 and/or university.

1 16. The system as defined in claim 15, wherein each detailed analysis includes a  
2 description of the college or the university;  
3 wherein each detailed analysis includes the faculty and the student body at the college  
4 or the university;  
5 wherein each detailed analysis includes admission and academic programs detailing  
6 the requirements the student must meet in order to be eligible for acceptance at the  
7 college or the university;  
8 wherein each detailed analysis includes available student activities and services  
9 including descriptions of available housing facilities and computer labs at the college  
10 or the university;

11 wherein each detailed analysis includes available intercollegiate and intramural  
12 athletics at the college or the university;  
13 wherein each detailed analysis includes scores needed on advanced placement tests to  
14 generate college credit at the college or the university; and  
15 wherein each detailed analysis includes an overview of financial aid offerings of the  
16 college or the university including what specific out-of-pocket costs there would be,  
17 standardized cost of attendance so as to ensure that the family compares true costs,  
18 information about amount of gift aid and self-help aid that is historically available  
19 based on the expected family contribution, and how much is historically given in  
20 funding that the family will not have to pay back versus funding the family will have  
21 to pay back or earn.

1 17. The system as defined in claim 10, wherein said appendix of the hard copy includes  
2 short sections.

1 18. The system as defined in claim 8, wherein said video of said college action plan  
2 provides an overview of said hard copy of said college action plan.

1 19. The system as defined in claim 9, wherein said test preparation system of said college  
2 action plan is designed to give the student thorough and interactive preparation;  
3 wherein said test preparation system provides a review of various tests required by  
4 colleges and universities; and  
5 wherein said test preparation system identifies weak areas of the student and arranges  
6 a specific tutorial program for each specific need of the student.

1 20. The system as defined in claim 9, wherein said test preparation system of said college  
2 action plan includes test preparation software for the PSAT, the SAT I, and the ACT;  
3 wherein said test preparation system of said college action plan includes a SAT I  
4 video; and  
5 wherein said test preparation system of said college action plan includes a SAT I  
6 practice test booklet.

1 21. The system as defined in claim 20, wherein said test preparation software is a CD.

1 22. The system as defined in claim 8, wherein said profile worksheet of said college  
2 action plan promotes the student to colleges and universities based on abilities and  
3 performances of the student in an area of profiling.

1 23. The system as defined in claim 22, wherein said area of profiling is based on student's  
2 indication on said college planning questionnaire;  
3 wherein said area of profiling includes academic;  
4 wherein said academic is based on academic achievements of the student;  
5 wherein said area of profiling includes artistic;  
6 wherein said artistic is based on excellence in the fine arts or the performing arts of the  
7 student;  
8 wherein said area of profiling includes athletic; and  
9 wherein said athletic is based on ability of the student to play collegiate sports.

1 24. A method of optimizing selection of a college or a university for a student with parents  
2 forming a family by utilizing a system provided by a program, wherein the system

includes college planning questionnaire software, a college planning questionnaire having a student portion and a parents portion, and a college action plan having a hard copy with a financial aid section, a college selection section with a list of colleges and/or universities, and a detailed analysis, and a video, said method comprising the steps of:

- a) enrolling, by the family, in the program;
- b) receiving, by the family from the program, the college planning questionnaire software and the college planning questionnaire;
- c) utilizing, by the student, the college planning questionnaire software to assist in filling out the college planning questionnaire;
- d) completing, by the student, the student section of the college planning questionnaire, and completing, by the parents, the parents section of the college planning questionnaire so as to form a completed college planning questionnaire;
- e) creating, by the program, the college action plan by utilizing information from the completed college planning questionnaire;
- f) taking, by the college action plan, the family through the entire college transition process;
- g) reading, by the family, the hard copy of the college action plan;
- h) watching, by the family, the video of the college action plan;
- i) utilizing, by the family, the financial aid section of the college action plan to provide the family with a detailed look at their current financial situation as it relates to paying for the college or the university;
- j) illustrating in the college selection section of the college action plan, in order of affordability, the list of colleges and/or universities selected from a list of



28 more than two thousand 4-year colleges and universities that best fit the needs  
29 of the student; and  
30 k) illustrating, by the college selection section, the detailed analysis of each  
31 college and/or university listed so that the family can make decisions about the  
32 merits of each college and/or university.

1 25. The method as defined in claim 24, wherein said step of utilizing, by the student, the  
2 college planning questionnaire software to assist in filling out the college planning  
3 questionnaire includes utilizing, by the student, the college planning questionnaire  
4 software to assist in filling out the college planning questionnaire by virtue of the  
5 college planning questionnaire software conducting a battery of tests in order to  
6 perform a thorough analysis of the likes and dislikes of the student and help the student  
7 identify appropriate areas of interest or specific college majors so as to form results.

1 26. The method as defined in claim 25, further comprising the step of comparing, by the  
2 college planning questionnaire software, the results of the student with corresponding  
3 college majors and potential career choices.

1 27. The method as defined in claim 24, wherein said step of completing, by the student,  
2 the student section of the college planning questionnaire, and completing, by the  
3 parents, the parents section of the college planning questionnaire so as to form a  
4 completed college planning questionnaire includes completing, by the student, the  
5 student section of the college planning questionnaire, and completing, by the parents,  
6 the parents section of the college planning questionnaire so as to form a completed  
7 college planning questionnaire that collects information from the family including

8 information about the interests, aptitude, abilities, talents, and college selection  
9 preferences of the student and critical information about the finances of the family  
10 from both the parents and the student.

1 28. The method as defined in claim 24, wherein said step of illustrating, by the college  
2 selection section, the detailed analysis of each college and/or university listed so that  
3 the family can make decisions about the merits of each college and/or university  
4 includes illustrating, by the college selection section, the detailed two-page analysis  
5 of each college and/or university that includes a description of the college or  
6 university, the faculty and the student body at the college or university, admission and  
7 academic programs detailing the requirements a student must meet in order to be  
8 eligible for acceptance to the college or university, available student activities and  
9 services including descriptions of available housing facilities and computer labs at the  
10 college or university, available intercollegiate and intramural athletics at the college  
11 or university, scores needed on advanced placement tests to generate college credit at  
12 the college or university, and a financial overview of the college or university  
13 including what the student's specific out-of-pocket costs would be so as to provide a  
14 standardized cost of attendance so as to ensure that the family is comparing true costs,  
15 and information about the amount of gift aid and self-help aid versus work-study and  
16 loans that is historically available at the college or university based on the family's  
17 specific expected financial contribution.

1 29. The method as defined in claim 24, wherein said step of utilizing, by the family, the  
2 financial aid section of the college action plan to provide the family with a detailed  
3 look at their current financial situation as it relates to paying for the college or the

4 university includes utilizing, by the family, the financial aid section of the college  
5 action plan to provide the family with a detailed look at their current financial situation  
6 as it relates to paying for the college or the university by providing an initial financial  
7 analysis and an expected family contribution as well as by educating the family about  
8 how the expected family contribution will be calculated so that the family can take a  
9 proactive approach and maximize a financial aid package through all available  
10 avenues.

1 30. The method as defined in claim 24, wherein said step of illustrating the list in the  
2 college selection section of the college action plan, in order of affordability, colleges  
3 and/or universities selected from a list of more than two thousand 4-year colleges and  
4 universities that best fit the needs of the student includes illustrating the list in the  
5 college selection section of the college action plan, in order of affordability, colleges  
6 and/or universities selected from a list of more than two thousand 4-year colleges and  
7 universities that best fit the needs of the student based on information from the  
8 completed college planning questionnaire including the student's GPA, test scores, as  
9 well as the student's individual preferences.

1 31. The method as defined in claim 24, wherein the hard copy of the college action plan  
2 further includes an action item checklist at the end of each section thereof, and wherein  
3 said method further comprises the step of utilizing, by the family, the action item  
4 checklist at the end of each section of the hard copy of the college action plan to assist  
5 the family in their progress through the college action plan.

1 32. The method as defined in claim 24, wherein the college planning questionnaire  
2 software further has a printable report, and wherein said method further comprises the  
3 step of printing the printable report, by the college planning questionnaire software,  
4 after completing each test to allow the student to evaluate their interests and have  
5 information about appropriate careers, annual income, industry outlook, and a brief job  
6 description of all the different careers.

1 33. The method as defined in claim 24, wherein the program has a database, and wherein  
2 said method further comprises the steps of :

- 3 a) logging in, by the program, the completed college planning questionnaire;
- 4 b) inputting, by the program, the completed college planning questionnaire into
- 5 the database;
- 6 c) reviewing, by the program, the college action plan;
- 7 d) determining, by the program, if additional information is needed;
- 8 e) providing, by the family to the program, the additional information, if answer
- 9 to step d) is yes and proceeding directly to step g);
- 10 f) proceeding directly to step g) if answer to step d) is no;
- 11 g) conducting, by the program, a final quality assurance of the college action plan;
- 12 h) mailing, by the program to the family, the college action plan;
- 13 i) documenting, by the program, said mailing step; and
- 14 j) producing, by the program, appropriate reports after said mailing step.

1 34. The method as defined in claim 24, further comprising the steps of:

- 2 a) recommending, by the financial aid section, specific strategies that the family  
3 could apply which may help lower their expected financial contribution so as  
4 to form recommended strategies;
- 5 b) illustrating, by the financial aid section, an adjusted statement of income and  
6 assets showing what the expected family contribution should look like if the  
7 family applied the recommended strategies;
- 8 c) determining, by the family, if the recommended strategies are to applied;
- 9 d) applying, by the family, the recommended strategies, if answer to step c) is yes;  
10 and
- 11 e) not applying, by the family, the recommended strategies, if answer to step c)  
12 is no.

1 35. The method as defined in claim 24, wherein the college action plan has a test  
2 preparation system with test preparation software for the PSAT, the SAT I, and the  
3 ACT, a SAT I video, and a SAT I practice test booklet; and  
4 wherein said method further comprises the step of utilizing, by the student, the test  
5 preparation software for the PSAT, the SAT I, and the ACT, the SAT I video, and the  
6 SAT I practice test booklet of the test preparation system to give the student thorough  
7 and interactive preparation, a review of the various tests required by colleges and  
8 universities, an identification of weak areas of the student, and a specific tutorial  
9 program for each specific need of the student.

1 36. The method as defined in claim 24, wherein the college action plan has a profile  
2 worksheet; and

3 wherein said method further comprises the step of completing the profile worksheet,  
4 by the student, to promote the student to colleges and universities based on abilities  
5 and performances of the student in areas of profiling based on student's indication on  
6 the completed college planning questionnaire.

1 37. The method as defined in claim 36, wherein said step of completing the profile  
2 worksheet of the college action plan, by the student, to promote the student to colleges  
3 and universities based on abilities and performances of the student in areas of profiling  
4 based on student's indication on the completed college planning questionnaire includes  
5 completing the profile worksheet of the college action plan, by the student, to promote  
6 the student to colleges and universities based on abilities and performances of the  
7 student in areas of profiling that include academic based on academic achievements  
8 of the student, artistic based on excellence in the fine arts or the performing arts of the  
9 student, and athletic based on ability of the student to play collegiate sports.